



Euromonitor  
International

# Hot Drinks in Estonia

December 2025

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### EXECUTIVE SUMMARY

Inflation drives value growth amid declining demand

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

Inflationary pressures drive value growth amid declining demand

Sharp increases in global coffee prices hinder consumption

Fruit/herbal tea remains significant

### WHAT'S NEXT?

Hot drinks set to rebound amid economic recovery

Growing demand for indulgent coffee experiences

Tea and other hot drinks will remain niche categories

### COMPETITIVE LANDSCAPE

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Premiumisation and convenience shape coffee consumption

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Declining demand amid economic pressures

Fresh ground coffee pods benefit from enduring demand for indulgent experiences

### WHAT'S NEXT?

Moderate value growth for coffee, driven by premiumisation

Product innovation to centre on flavours

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Premiumisation could represent key growth opportunity

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### [Other Hot Drinks in Estonia](#)

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## INDUSTRY PERFORMANCE

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Plant-based hot drinks remain niche, despite rapid growth

## WHAT'S NEXT?

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Other hot drinks will remain largely neglected by manufacturers

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